

Working With Us

2020 Client Survey Results

CWM clients took the time to provide important feedback and insights to help us serve you better.

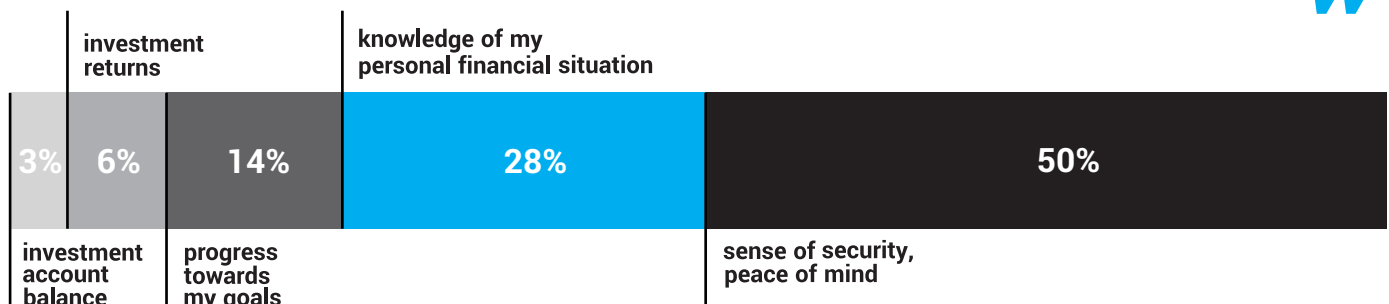
The results were overwhelmingly positive, but there was plenty of lessons learned that will help our firm deliver even more value.

The value we deliver

Different people value different things at different points in time. It's always very difficult, especially as a boutique service provider, to be all things to all people.

So we asked this question to understand the value you receive. Here's what you told us:

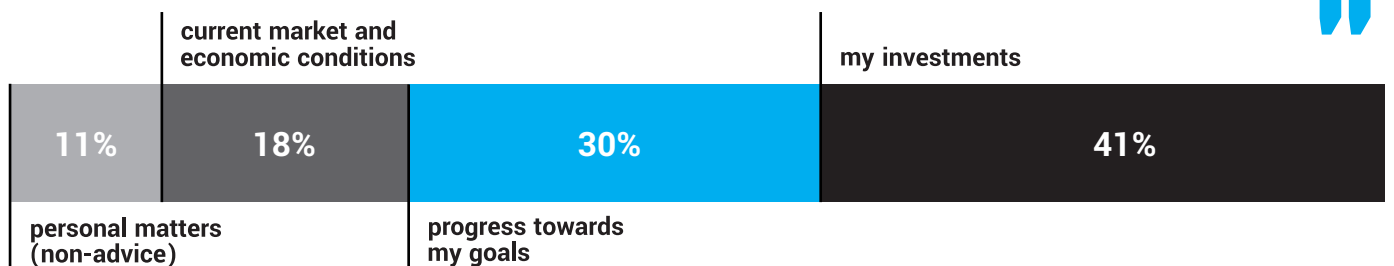
How do you primarily measure the value you received from your adviser?



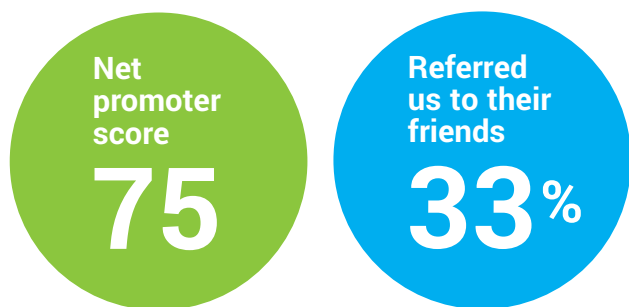
Our ongoing connection

We have been structuring our ongoing progress meetings and discussions a little more than we had in the past. Here's what you told us you want us to focus on when working with your adviser:

When you connect with your adviser, how do you want to spend your time?



Helping your friends



We are truly grateful to our many clients who trust us with referrals to their family, friends and colleagues. The average Net Promoter Score across all advisers in our practice is 75, which is very high!

While growth is important to us, we want to do it in a way that is sustainable and does not detract from the services to our existing clients. As a result, we have been selective in who we have offered to help. This is evolving, because we want to ensure that the people our clients care about most get the best help they can.

The top 3 things we learned:

1. Investments and making money are great, but achieving your goals are even more important. It's your purpose and 'why' that matters most.
2. Having a sense of security and peace of mind comes from knowing you are on track to meet your goals, no matter what the investment and economic climate throws at you. This is investment resilience.
3. Outside of our predetermined and scheduled catch ups, you want us to check in more often.

Here's what we're going to do:

1. We're going to spend more time discussing your 'why', your goals and your progress towards them.
2. We're going to have a more structured way of conducting our progress meetings, which you may have noticed over the last 12 months already.
3. We're going to check in and communicate with you more often.

In summary, it's our relationship, range of services, our experience with clients like you, and having a sense of security and peace of mind that you find most important in our relationship - and we are absolutely honored that we can serve you in this way.

Everyone and every family is different, and there is no 'one service model' that fits all, especially for our client base. In fact, 58% of you said that 'providing me with a customised experience' is the attribute that contributes most to your overall confidence in CWM. So we will continue to ask for your feedback to ensure that we are delivering maximum value.

If there is a burning issue you would like to raise with us, please reach out to me personally, I would be delighted to speak with you and understand how we can serve you better.

Thank you from the bottom of our hearts.



Ben Calder
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